2019 Tax Appointment Checklist

Please organize and bring to your tax appointment the following items, as they apply to your filing needs.

All Taxpayers:

- ☐ W2 (from each Employer)
- ☐ Driver's License or Picture ID - Everyone
- ☐ Social Security Cards - Taxpayer and dependents
- ☐ Proof Dependent Care
- ☐ Proof of Health Care:
  - Marketplace Premium Form 1095A
  - Other Group Insurance Form 1095B or 1095C
- ☐ Previous Years Returns *(new clients)*

Schedule A - Itemized Deduction Taxpayers: (if applies)

- ☐ 1098 Mortgage Interest Statement
- ☐ House Taxes
- ☐ New House Settlement Statement (if have purchased or refinanced a home)
- ☐ Car Taxes
- ☐ Medical Expenses *(total must be at least 7.5% of income)*
- ☐ Charitable Contributions
- ☐ Miscellaneous Deductions
- ☐ Casualty or Theft Loss
- ☐ Gambling Income and Expenses
- ☐ Investment Income and Expenses

College Students or Dependent College Students (if applies)

- ☐ 1098T - Tuition Statement
- ☐ Annual Student's Account Record *(Jan-Dec)*
- ☐ Receipts for Books and/or Required Supplies

Additional Income Documents (if applies)

- ☐ 1099Miscellaneous - Independent/Contractor
- ☐ 1099 Div. - Dividends
- ☐ 1099R - Retirement
- ☐ 1099 Int. - Interest
- ☐ 1099G – Unemployment

Business (Schedule C) – (If applies)

- Secretary of State – Articles of Incorporation/Organization
- Business Description
- Tax ID number
- Income verification
- Payroll Expenses, Statements
- Expense Spreadsheet and/or Profit and Loss Statement
- Auto Data and expenses, if applicable
- Business Equipment (date of purchase, amount)

Business (Other Entities) – (If applies)

- Secretary of State – Articles of Incorporation or Organization
- Tax ID Number
- Trial Balance or Profit and Loss
- Balance Sheet
- List of Assets & Previous Depreciation
- Basis in Company
- K1 (if applicable)
- 1099 Lists and amounts filed and paid
- Payroll Reports
- Any 1099K or Income Verification

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